

GENERAL SERVICES ADMINISTRATION

Federal Acquisition Service



Authorized Federal Supply Schedule Price List

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!™, a menu-driven database system. The Internet address for GSA Advantage!™ is:

<http://www.fss.gsa.gov>

GSA Schedule 36

MAIL MANAGEMENT SERVICES

FSC Group 36

Contract Number: GS-03F-0066X

For more information on ordering from Federal Supply Schedules, click on the FSS Schedules button at <http://www.gsa.gov>

Contract Period: January 15, 2011 to January 14, 2016
(with three 5-Year Options)

WFM Associates, Inc.

2517 Route 35 South
Building C, Suite 102
Manasquan, NJ 08736-1918

WFM is a Small Business

Contract Administration Information:

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TABLE OF CONTENTS

Section 1. Customer Information.....	1
Section 2. Mail Management Services	1
2.1. Scope of Work	3
SIN 733 1 Mail Room Administrative Support	3
SIN 733 2 Presort Services	8
SIN 733 3 Miscellaneous Mail Services	10
SIN 733 4 List Management Services.....	15
Section 3. Ordering Information.....	19
3.1. Ordering Procedures For Services Priced on GSA Schedules at Hourly Rates	19
3.1.1. Prepare a Request for Quotes.....	19
3.1.2. Transmit the Request for Quotes to Contractors.....	20
3.1.3. Evaluate Quotes and Select the Contractor to Receive the Order.....	20
3.2. Blanket Purchase Agreements	20

Section 1. Customer Information

- 1a.** Table of awarded special item numbers:
- | | |
|------------|----------------------------------|
| SIN 733-1: | Mail Room Administrative Support |
| SIN 733-2: | Mail Presort |
| SIN 733-3: | Miscellaneous Mail Services |
| SIN 733-4: | List Management Services |
- 1b.** Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract:
- See pricing section starting on page 3.
- 2.** Maximum order: All SINs – \$1,000,000.00
- 3.** Minimum order: \$3,000.00
- 4.** Geographic coverage: Nationwide.
- 5.** Points of production/performance:
- | | | |
|------------|----------|----------------|
| California | Nebraska | Washington, DC |
| Texas | Vermont | New Jersey |
- 6.** Billable rate for labor rates under the Services Contract Act = applicable Department of Labor Prevailing wage determination for the geographical areas that will be performed, the DOL Health and welfare factor, plus a 74% mark-up.
- Discount from list price or statement of net prices: Prices shown are net discounted.
- 7.** Quantity discounts: Five million or more pieces per month will allow an agency to negotiate a quantity discount.
- 8.** Prompt payment terms: Net 30.
- 9a.** Notification that Government purchase cards are accepted below the micropurchase threshold:
- Government purchase cards are accepted for orders under \$3,000.00.
- 9b.** Notification whether Government purchase cards are accepted or not accepted above the micropurchase threshold:
- Government purchase cards are accepted for orders above \$3,000.00.
- 10.** Foreign items: Not Applicable.
- 11a.** Time of delivery:
- Delivery time will be negotiated with each Federal Agency placing an order.
- 11b.** Expedited delivery:
- Is available for all services and can be negotiated with WFM.
- 11c.** Overnight and 2-day delivery: Negotiated on a case by case basis.

- 11d.** Urgent requirements: Negotiated on a case by case basis.
- 12.** FOB point(s): Destination.
- 13.** Ordering address:
WFM Associates, Inc.
2517 Route 35, Building C
Suite 102
Manasquan, NJ 08736
- 14.** Payment address: Same as ordering address.
- 15.** Warranty provision: Not applicable
- 16.** Export packing charges: Not applicable
- 17.** Terms and conditions of Government purchase card acceptance:
WFM Associates, Inc. will accept payment through the Government purchase card for any size order.
- 18.** Terms and conditions of rental, maintenance, and repair: Not applicable
- 19.** Terms and conditions of installation: Not applicable
- 20.** Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices: Not applicable
- 20a.** Terms and conditions for any other services: Not applicable
- 21.** List of service and distribution points: Not applicable
- 22.** List of participating dealers: Not applicable
- 23.** Preventive maintenance: Not applicable
- 24.** Environmental attributes: Not applicable
- 25.** Data Universal Number System (DUNS) number: # 809067846
- 26.** Notification regarding registration in the Central Contractor Registration (CCR) database:
WFM Associates, Inc. is registered in the CCR database – Cage Code #53E16.

Section 2. Mail Management Services

2.1. Scope of Work

WFM Associates, Inc. (WFM) is providing Mail Management and fulfillment Services to enable government agencies to meet their mail and fulfillment management needs. This schedule will provide Federal Agencies with quick and easy access to contractors who can help them meet their needs. WFM will furnish all equipment, labor, supplies, and supervision, and perform all operations necessary to successfully complete these services.

733-1 Mail Room Administrative Support

As specified in a task order, WFM will provide daily mail room administrative services consisting of, but not limited to: accepting incoming mail from USPS and courier services such as UPS and FedEx; accepting and signing for certified mail, registered mail, and overnight mail; distributing all mail using an office roster; processing outgoing mail; and metering flats, letters, packages, etc.

Labor Category Descriptions:

Program Manager

Functional Responsibilities:

- Analyze and develop solutions based on agency requirements revolving around process improvements
- Lead or participate in the solution development process to uncover the goals, problems and requirements of the agencies
- Analyze and benchmark agency requirements
- Develop solutions and scope of work with data gathering and analysis
- Coordinate task assignments, timelines, and internal operations

Minimum Education: BS in Business

Minimum Years of Experience: 5 – 10 years experience

Presort Manager

Functional Responsibilities:

- Oversee the production, preparation, analysis and distribution of mail operations
- Manage facility operations and structures
- Responsible for maintenance, project planning, communication and space planning
- Responsible for all financial reporting, including budgeting and forecasting
- Responsible for adherence to all DOT and USPS regulations
- Assure all quality process and procedures are enforced

Minimum Education: College Degree

Minimum Years of Experience: or 10 years experience

Mail Room Manager

Functional Responsibilities:

- Responsible for all mail operations which will include scheduling, coordination and workflow of all mail rooms
- Manage the hiring, training and professional development of all mail room personnel
- Interface with equipment vendors as single point of contact for problem resolution
- Develop strategies to enhance service levels or reduce costs
- Be innovative and aggressive in the pursuit of new technologies, systems and methods that support the agency's mission
- Implement best practices
- Develop and document all operating procedures for all mail room processes

Minimum Education: Two years business school

Minimum Years of Experience: 5 years experience

SCA Labor Category Descriptions:

Presort Clerk (01112 - General Clerk II)

This position requires familiarity with the terminology of the office unit. The General Clerk selects appropriate methods from a wide variety of procedures or makes simple adaptations and interpretations of a limited number of substantive guides and manuals. The clerical steps often vary in type or sequence, depending on the task. Recognized problems are referred to others.

Mail Room Supervisor (01113 General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

The General Clerk III may also direct lower level clerks. Positions above level IV are excluded. Such positions (which may include supervisory responsibility over lower level clerks) require workers to use a thorough knowledge of an office's work and routine to: 1) choose among widely varying methods and procedures to process complex transactions; and 2) select or devise steps necessary to complete assignments. Typical jobs covered by this exclusion include administrative assistants, clerical supervisors, and office managers.

Mail Room Lead (01113 General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a

wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

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Mail Room Clerk (01112 - General Clerk II)

This position requires familiarity with the terminology of the office unit. The General Clerk selects appropriate methods from a wide variety of procedures or makes simple adaptations and interpretations of a limited number of substantive guides and manuals. The clerical steps often vary in type or sequence, depending on the task. Recognized problems are referred to others.

Equipment Operator (01113 - General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

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Mail Room CSR (01113 - General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

The General Clerk III may also direct lower level clerks. Positions above level IV are excluded. Such positions (which may include supervisory responsibility over lower level clerks) require workers to use a thorough knowledge of an office's work and routine to: 1) choose among widely varying methods and procedures to process complex transactions; and 2) select or devise steps necessary to complete assignments. Typical jobs covered by this exclusion include administrative assistants,

clerical supervisors, and office managers.

Data Entry (01052 - Data Entry Operator II)

This position requires the application of experience and judgment in selecting procedures to be followed, and searching for interpreting, selecting, or coding items to be entered from a variety of document sources. The Data Entry Operator II may occasionally perform routine work as described for Data Entry Operator I.

Excluded are operators above Level II using the key entry controls to access, read, and evaluate the substance of specific records to take substantive actions, or to make entices requiring a similar level of knowledge.

List Maintenance Clerk (01113 - General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

The General Clerk III may also direct lower level clerks. Positions above level IV are excluded. Such positions (which may include supervisory responsibility over lower level clerks) require workers to use a thorough knowledge of an office's work and routine to: 1) choose among widely varying methods and procedures to process complex transactions; and 2) select or devise steps necessary to complete assignments. Typical jobs covered by this exclusion include administrative assistants, clerical supervisors, and office managers.

Administrative Assistant (01020) Administrative Assistant)

In addition to secretarial duties (filing, taking phone calls, scheduling appointments, making travel arrangements), this position will provide administrative support to executive staff with office management responsibilities to include budgeting, personnel records and payroll. The Administrative Assistant may be required to work independently on projects requiring research and preparation of briefing charts and other presentation materials.

Programmer (14044 - Computer Programmer IV)

The Computer Programmer IV applies expertise in programming procedures to complex programs; recommends the redesign of programs, investigates and analyzes feasibility and program requirements, and develops programming specifications. Assigned programs typically affect a broad multi-user computer system which meets the data processing needs of a broad area (e.g., manufacturing, logistics planning, finance management, human resources, or material management) or a computer system for a project in engineering, research, accounting, statistics, etc. This Programmer plans the full range of programming actions to produce several interrelated but different products from numerous and diverse data elements, which are usually from different sources; solves difficult programming problems, and uses knowledge of pertinent system software, computer equipment, work processes, regulations, and management practices.

This Programmer performs such duties as: developing, modifying, and maintains complex programs; designs and implements the interrelations of files and records within programs which will effectively fit into the overall design of the project; works with problems or concepts and develops programs for the solution to major scientific computational problems requiring the analysis and development of logical or mathematical descriptions of functions to be programmed; and develops occasional special programs, e.g. a critical path analysis program to assist in managing a special project. This Worker tests, documents, and writes operating instructions for all work, confers with other EDP personnel to secure information, investigate and resolve problems, and coordinates work efforts.

In addition, this incumbent performs such programming analyses as: investigating the feasibility of alternate program design approaches to determine the best balanced solution, e.g., one that will best satisfy immediate user needs, facilitate subsequent modification, and conserve resources. Duties include the following: assisting user personnel in defining problems or needs, determining work organization on typical maintenance projects and smaller scale, working on limited new projects, the necessary files and records, and their interrelation with the program or working on large or more complicated projects, and participating as a team member along with other EDP personnel and users, holding responsibility for a portion of the project.

The Computer Programmer IV works independently under overall objectives and direction, apprising the supervisor about progress and unusual complications and modifying and adapting precedent solutions and proven approaches. Guidelines include constraints imposed by the related programs with which the incumbent's programs must be meshed. Completed work is reviewed for timeliness, compatibility with other work, and effectiveness in meeting requirements. This Worker may function as team leader or supervise a few lower level programmers or technicians on assigned work.

Labor Rates (SCA Occupation Code and Title)	GSA Hourly Rate
Program Manager (non-SCA)	\$69.80
Presort Manager (non-SCA)	\$48.90
Mail Room Manager (non-SCA)	\$48.90
Presort Clerk (01112 - General Clerk II)	*
Mail Room Supervisor (01113 - General Clerk III)	*
Mail Room Lead (01113 - General Clerk III)	*
Mail Room Clerk (01112 - General Clerk II)	*
Equipment Operator (01113 - General Clerk III)	*
Mail Room CSR (01113 - General Clerk III)	*
Data Entry (01052 – Data Entry Operator II)	*
List Maint. Clerk (01113 - General Clerk III)	*
Administrative Asst. (01020 – Administrative Assistant)	*
Programmer (14044 Computer Operator IV)	*
*Labor rates under the Services Contract Act (SCA) = applicable prevailing wage determination and health and welfare factor for the geographical area plus a 74% mark-up.	

Digital Mail Delivery Service

The digital mail delivery service meets the needs of any Agency of any size or volume. Instead of delivering physical mail to each employee or location, the digital mail delivers high quality images of mail to each employee's desktop where it can be viewed, forwarded, downloaded and printed.

This mail model service offering is delivered on a cost per image (letter) which includes the capture, distributing, and personnel both on and off site.

The Digital Mailroom Service delivers a wide range of benefits:

- **Reduced Costs** – Reduces both delivery and secondary costs associated with mail handling and storage (e.g. copying, forwarding, filing).
- **Improved Efficiency** – Acts as a front end to other applications, eliminating manual data entry, improving transaction and data accuracy and increasing productivity.
- **Speedier Mail Delivery** – Routes each letter as soon as it is scanned and sends interoffice mail with the click of a button.
- **Increased Accessibility** – Gives employees traveling or working at home the same access to their paper mail that they have to their email.
- **Improved Security** – Reduces exposure to biohazards because employees handle images instead of the paper mail.
- **Searchable Database** – Creates a database of mail images that can be searched by date, sender and keyword.

<u>Digital Mailroom Service Pricing</u>	GSA Price
* WFM Mail Delivery Per Letter - Pricing covers all costs associated with Digital Mailroom services including that of personnel and technology needed to perform the job.	\$0.3645
Installation of Digital Mailroom - One time charge	\$19,041.75
*Please note: 90,000 letter minimum per month is required.	

SIN 733 2 Presort Services

WFM will provide all management, supervision, labor, materials, supplies, and equipment, and will plan, schedule, coordinate, and assure effective performance of all services described herein.

For various Federal Agencies, WFM will provide a minimum of presort mail and barcode services applicable to the postage discount level offered for domestic First-Class Federal Government mail, in accordance with standard commercial practices and all USPS regulations, at various locations nationwide. WFM is required to have and continually maintain a USPS Coding Accuracy Support System (CASS) certification throughout the term of this contract and any option period.

Each time that a mail pickup is made, WFM's representative making the pickup must sign a prepared receipt that indicates the pickup date, and the exact number of pieces of mail consigned.

WFM must collect and maintain this information and make it available to the agency for examination upon request by the Contracting Officer or his representative.

No mail will be rejected by WFM due to below-standard address format (full-postage rates will apply).

USPS Rates - LETTERS	
Auto 5 digit	\$.3350
Auto 3 digit	\$.3570
Auto AADC	\$.3600
Auto MADC	\$.38200
Non-automated	\$.414

ISI Presort fee – LETTERS	\$0.0294 per letter
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USPS Rates - FLATS

Weight Not Over (ounces)	Automation				Non automation
	5-Digit	3-Digit	ADC	Mixed ADC	Presorted
1	\$0.380	\$0.542	\$0.603	\$0.725	\$0.757
2	\$0.550	\$0.712	\$0.773	\$0.895	\$0.927
3	\$0.720	\$0.882	\$0.943	\$1.065	\$1.097
4	\$0.890	\$1.052	\$1.113	\$1.235	\$1.267
5	\$1.060	\$1.222	\$1.283	\$1.405	\$1.437
6	\$1.230	\$1.392	\$1.453	\$1.575	\$1.607
7	\$1.400	\$1.562	\$1.623	\$1.745	\$1.777
8	\$1.570	\$1.732	\$1.793	\$1.915	\$1.947
9	\$1.740	\$1.902	\$1.963	\$2.085	\$2.117
10	\$1.910	\$2.072	\$2.133	\$2.255	\$2.287
11	\$2.080	\$2.242	\$2.303	\$2.425	\$2.457
12	\$2.250	\$2.412	\$2.473	\$2.595	\$2.627
13	\$2.420	\$2.582	\$2.643	\$2.765	\$2.797
WFM Presort Fees – FLATS			\$0.24		
Encoding		\$0.34			
Rejections:					
Return to sender		No Charge			
Forward on		\$0.77			

Pick-up charge	\$0.96 per mile will be charged to customers who have less than 1 million pieces of mail per month. For customers with over 1 million pieces of mail per month, there will be no pick-up charge.
(Five million or more pieces of presorted mail per month allows customer to negotiate a reduced per-letter charge.)	

SIN 733 3 Miscellaneous Mail Services

WFM will provide all management, supervision, labor, and equipment, and will plan, schedule, coordinate, and assure effective performance of all services described herein. Miscellaneous Mail Services consist of, but are not limited to: capture, image, creation of documents for addressing, labeling, folding, inserting, bursting, collating, mail match, wrapping, software services, metering, and stamping in accordance with standard commercial practices and all USPS regulations, at various locations nationwide.

Labor Category Descriptions:

Fulfillment Manager

Functional Responsibilities:

- Responsible for the technical and operational leadership of the operation
- Provide the coordination between the resource managers and supervisors to ensure all operational requirements are being met
- Define, generate and review project requirements and documentation
- Serve as primary interface and focal point with agency and its internal clients
- Monitor and ensure that work schedule and budgets are well defined and maintained

Minimum Education: BS Degree

Minimum Years of Experience: 10 years experience

Fulfillment Supervisor

Functional Responsibilities:

- Responsible for analysis of agency orders, creation of job control, and control statements that drive the fulfillment process utilizing programs that manage the output of the agency requirements
- Manage the time requirements throughout production, perform quality control checks with the established sampling and control procedures

Minimum Education: College Degree or course work in programming

Minimum Years of Experience: + 2 years experience

Consultant

Functional Responsibilities:

- Must plan and coordinate a broad range of services that allow organizations to operate efficiently
- Coordinate space allocation, facility maintenance, operations, property maintenance and equipment that may oversee centralized operations or that will meet the needs of multiple departments for information in the data processing of mail, material scheduling, distribution, printing and reproduction, records management, telecommunications management, security, recycling and transportation services
- Ensure that equipment requirements, government regulations and safety standards are followed and up to date

Minimum Education: Business Degree

Minimum Years of Experience: 10 years of experience

SCA Labor Category Descriptions:

Fulfillment Clerk (01113 - General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

The General Clerk III may also direct lower level clerks. Positions above level IV are excluded. Such positions (which may include supervisory responsibility over lower level clerks) require workers to use a thorough knowledge of an office's work and routine to: 1) choose among widely varying methods and procedures to process complex transactions; and 2) select or devise steps necessary to complete assignments. Typical jobs covered by this exclusion include administrative assistants, clerical supervisors, and office managers.

Shipping Clerk (01112 - General Clerk II)

This position requires familiarity with the terminology of the office unit. The General Clerk selects appropriate methods from a wide variety of procedures or makes simple adaptations and interpretations of a limited number of substantive guides and manuals. The clerical steps often vary in type or sequence, depending on the task. Recognized problems are referred to others.

Data Entry Clerk (01152 -Data Entry Operator II)

This position requires the application of experience and judgment in selecting procedures to be followed, and searching for interpreting, selecting, or coding items to be entered from a variety of document sources. The Data Entry Operator II may occasionally perform routine work as described for Data Entry Operator I.

Excluded are operators above Level II using the key entry controls to access, read, and evaluate the substance of specific records to take substantive actions, or to make entices requiring a similar level of knowledge.

Programmer (14044 – Computer Programmer IV)

The Computer Programmer IV applies expertise in programming procedures to complex programs; recommends the redesign of programs, investigates and analyzes feasibility and program requirements, and develops programming specifications. Assigned programs typically affect a broad multi-user computer system which meets the data processing needs of a broad area (e.g., manufacturing, logistics planning, finance management, human resources, or material management) or a computer system for a project in engineering, research, accounting, statistics, etc. This Programmer plans the full range of programming actions to produce several interrelated but different products from numerous and diverse data elements, which are usually from different sources; solves difficult programming problems, and uses knowledge of pertinent system software, computer equipment, work processes, regulations, and management practices.

This Programmer performs such duties as: developing, modifying, and maintains complex programs; designs and implements the interrelations of files and records within programs which will effectively fit into the overall design of the project; works with problems or concepts and develops programs for the solution to major scientific computational problems requiring the analysis and development of logical or mathematical descriptions of functions to be programmed; and develops occasional special programs, e.g. a critical path analysis program to assist in managing a special project. This Worker tests, documents, and writes operating instructions for all work, confers with other EDP personnel to secure information, investigate and resolve problems, and coordinates work efforts.

In addition, this incumbent performs such programming analyses as: investigating the feasibility of alternate program design approaches to determine the best balanced solution, e.g., one that will best satisfy immediate user needs, facilitate subsequent modification, and conserve resources. Duties include the following: assisting user personnel in defining problems or needs, determining work organization on typical maintenance projects and smaller scale, working on limited new projects, the necessary files and records, and their interrelation with the program or working on large or more complicated projects, and participating as a team member along with other EDP personnel and users, holding responsibility for a portion of the project.

The Computer Programmer IV works independently under overall objectives and direction, apprising the supervisor about progress and unusual complications and modifying and adapting precedent solutions and proven approaches. Guidelines include constraints imposed by the related programs with which the incumbent's programs must be meshed. Completed work is reviewed for timeliness, compatibility with other work, and effectiveness in meeting requirements. This Worker may function

as team leader or supervise a few lower level programmers or technicians on assigned work. 56

Equipment Operator (01113 - General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

The General Clerk III may also direct lower level clerks. Positions above level IV are excluded. Such positions (which may include supervisory responsibility over lower level clerks) require workers to use a thorough knowledge of an office's work and routine to: 1) choose among widely varying methods and procedures to process complex transactions; and 2) select or devise steps necessary to complete assignments. Typical jobs covered by this exclusion include administrative assistants, clerical supervisors, and office managers.

Forms Analyst (01113 - General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

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Inventory Control (01113 - General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

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methods and procedures to process complex transactions; and 2) select or devise steps necessary to complete assignments. Typical jobs covered by this exclusion include administrative assistants, clerical supervisors, and office managers.

Labor Rates (SCA Occupation Code and Title)	GSA Hourly Rate
Fulfillment Manager (non-SCA)	\$48.90
Fulfillment Supervisor (non-SCA)	\$37.23
Consultant (non-SCA)	\$116.38
Fulfillment Clerk (01113 - General Clerk III)	*
Shipping Clerk (01112 - General Clerk II)	*
Data Entry Clerk (01052 – Data Entry Operator II)	*
Programmer (14044 – Computer Operator IV)	*
Equipment Operator (01113 - General Clerk III)	*
Forms Analyst (01113 - General Clerk III)	*
Inventory Control (01113 - General Clerk III)	*
*Labor rates under the Services Contract Act (SCA) = applicable prevailing wage determination for the geographical area plus a 74% mark-up.	

SIN 733 4 List Management Services

WFM will provide all management, supervision, labor, and equipment, and will plan, schedule, coordinate, and assure effective performance of all services described herein. List Management Services consist of, but are not limited to: data entry, statement generation, creation of marketing documents for, address label printing, list management, list cleanup, and list coding in accordance with standard commercial practices.

Labor Category Descriptions:

Project Manager

Functional Responsibilities:

- Analyze and develop solutions based on project requirements revolving around process improvements
- Lead or participate in the solution development process to uncover the goals, problems and requirements of the agencies
- Analyze and benchmark agency requirements
- Develop solutions and scope of work with data gathering and analysis
- Coordinate task assignments, timelines, and internal operations

Minimum Education: BS in Business

Minimum Years of Experience: 5 – 10 years experience

List Broker

Functional Responsibilities:

- Responsibilities include analyzing marketing dynamics
- Developing marketing strategies
- Negotiating pricing with list owners and media companies
- Analyzing campaign results
- Must understand printing services such as print on demand
- Must understand data management services, such as the national change of address
- Must understand directory products, such as criss-cross directories
- Must understand marketing services lists, such as business to business and consumer
- Must understand mail services, such as addressing, tabbing and labeling

Minimum Education: College Degree, some program studies

Minimum Years of Experience: 5 years experience

Consultant

Functional Responsibilities:

- Must plan and coordinate a broad range of services that allow organizations to operate efficiently
- Coordinate space allocation, facility maintenance, operations, property maintenance and equipment that may oversee centralized operations or that will meet the needs of multiple departments for information in the data processing of mail, material scheduling, distribution, printing and reproduction, records management, telecommunications management, security, recycling and transportation services
- Ensure that equipment requirements, government regulations and safety standards are followed and up to date

Minimum Education: Business Degree

Minimum Years of Experience: 10 years of experience

SCA Labor Category Descriptions:

Data Entry (01052 - Data Entry Operator II)

This position requires the application of experience and judgment in selecting procedures to be followed, and searching for interpreting, selecting, or coding items to be entered from a variety of document sources. The Data Entry Operator II may occasionally perform routine work as described for Data Entry Operator I.

Excluded are operators above Level II using the key entry controls to access, read, and evaluate the substance of specific records to take substantive actions, or to make entices requiring a similar level of knowledge.

Database Manager Specialist (13054 - Library Information Technology Systems)

The Library Information Technology Systems Administrator administers and supports daily operational requirements of library and information computer network systems including workstation, file servers, and web servers. Duties typically involve the installation of hardware,

software, systems upgrades, network accounts, network security, and web page design, interface and updates, planning and implementing long-range automation plan, period reports, and local system design documentation. This Administrator trains staff on software applicable to their position, assists patrons with information technology, and provides instruction on computers and applications.

Equipment Operator (01113 - General Clerk III)

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

The General Clerk III may also direct lower level clerks. Positions above level IV are excluded. Such positions (which may include supervisory responsibility over lower level clerks) require workers to use a thorough knowledge of an office's work and routine to: 1) choose among widely varying methods and procedures to process complex transactions; and 2) select or devise steps necessary to complete assignments. Typical jobs covered by this exclusion include administrative assistants, clerical supervisors, and office managers.

Programmer (14044 - Computer Programmer IV)

The Computer Programmer IV applies expertise in programming procedures to complex programs; recommends the redesign of programs, investigates and analyzes feasibility and program requirements, and develops programming specifications. Assigned programs typically affect a broad multi-user computer system which meets the data processing needs of a broad area (e.g., manufacturing, logistics planning, finance management, human resources, or material management) or a computer system for a project in engineering, research, accounting, statistics, etc. This Programmer plans the full range of programming actions to produce several interrelated but different products from numerous and diverse data elements, which are usually from different sources; solves difficult programming problems, and uses knowledge of pertinent system software, computer equipment, work processes, regulations, and management practices.

This Programmer performs such duties as: developing, modifying, and maintains complex programs; designs and implements the interrelations of files and records within programs which will effectively fit into the overall design of the project; works with problems or concepts and develops programs for the solution to major scientific computational problems requiring the analysis and development of logical or mathematical descriptions of functions to be programmed; and develops occasional special programs, e.g. a critical path analysis program to assist in managing a special project. This Worker tests, documents, and writes operating instructions for all work, confers with other EDP personnel to secure information, investigate and resolve problems, and coordinates work efforts.

In addition, this incumbent performs such programming analyses as: investigating the feasibility of alternate program design approaches to determine the best balanced solution, e.g., one that will best

satisfy immediate user needs, facilitate subsequent modification, and conserve resources. Duties include the following: assisting user personnel in defining problems or needs, determining work organization on typical maintenance projects and smaller scale, working on limited new projects, the necessary files and records, and their interrelation with the program or working on large or more complicated projects, and participating as a team member along with other EDP personnel and users, holding responsibility for a portion of the project.

The Computer Programmer IV works independently under overall objectives and direction, apprising the supervisor about progress and unusual complications and modifying and adapting precedent solutions and proven approaches. Guidelines include constraints imposed by the related programs with which the incumbent's programs must be meshed. Completed work is reviewed for timeliness, compatibility with other work, and effectiveness in meeting requirements. This Worker may function as team leader or supervise a few lower level programmers or technicians on assigned work.

Labor Rates	GSA Hourly Rate
Project Manager (non-SCA)	\$70.10
List Broker (non-SCA)	\$46.54
Consultant (non-SCA)	\$116.38
Data Entry (01052 - Data Entry Operator II)	*
Data Base Management Specialist (13054 – Library Information Technology Systems)	*
Equipment Operator (01113 – General Clerk III)	*
Programmer (14044 – Computer Operator IV)	*
Residential Lists per 1,000	\$8.39
Consumer Lists per 1,000	\$68.17
*Labor rates under the Services Contract Act (SCA) = applicable prevailing wage determination for the geographical areas plus a 74% mark-up.	

Section 3. Ordering Information

3.1. Ordering Procedures For Services Priced on GSA Schedules at Hourly Rates

FAR 8.402 contemplates that GSA may occasionally find it necessary to establish special ordering procedures for individual Federal Supply Schedules or for some Special Item Numbers (SINs) within a Schedule. GSA has established special ordering procedures for services that are priced on Schedule at hourly rates. These special ordering procedures take precedence over the procedures in FAR 8.404.

The GSA has determined that the rates for services contained in the contractor's price list applicable to this schedule are fair and reasonable. However; the ordering office using this contract is responsible for considering the level of effort and mix of labor proposed to perform specific tasks being ordered and for making a determination that the total firm-fixed price or ceiling price is fair and reasonable.

The ordering office should give preference to small business concerns when two or more contractors can provide the services at the same firm-fixed price or ceiling price.

When the ordering office's requirement involves both products as well as professional services, the ordering office should total the prices for the products and the firm-fixed price for the services and select the contractor that represents the greatest value in terms of meeting the agency's total needs.

The ordering office, at a minimum, should document orders by identifying the contractor the services were purchased from, the services purchased, and the amount paid. If other than a firm-fixed price order is placed, such documentation should include the basis for the determination to use a labor-hour or time-and-materials order. For agency requirements in excess of the micro-purchase threshold, the order file should document the evaluation of Schedule contractors' quotes that formed the basis for the selection of the contractor that received the order and the rationale for any trade-offs made in making the selection.

3.1.1. Prepare a Request for Quotes

1. A performance-based statement of work that outlines, at a minimum, the work to be performed, location of work, period of performance, deliverable schedule, applicable standards, acceptance criteria, and any special requirements (i.e., security clearances, travel, special knowledge, etc.) should be prepared.
2. A request for quotes should be prepared that includes the performance-based statement of work and requests the contractors to submit either a firm-fixed price or a ceiling price to provide the services outlined in the statement of work. A firm-fixed price order shall be requested, unless the ordering office makes a determination that it is not possible at the time of placing the order to estimate accurately the extent or duration of the work or to anticipate cost with any reasonable degree of confidence. When such a determination is made, a labor hour or time-and-materials quote may be requested. The firm-fixed price shall be based on

the hourly rates in the schedule contract and shall consider the mix of labor categories and level of effort required to perform the services described in the statement of work. The firm-fixed price of the order should also include any other incidental costs related to performance of the services ordered. The order may provide for reimbursement of travel costs at the rates provided in the Federal Travel or Joint Travel Regulations, or as a fixed-price incidental item. A ceiling price must be established for labor-hour and time-and-materials orders.

3. The request for quotes may request the contractors, if necessary or appropriate, to submit a project plan for performing the task and information on the contractor's experience and/or past performance performing similar tasks.
4. The request for quotes shall notify the contractors what basis will be used for selecting the contractor to receive the order. The notice shall include the best value selection criteria including the intended use of past performance factors.

3.1.2. Transmit the Request for Quotes to Contractors

1. Based upon an initial evaluation of catalogs and price lists; the ordering office should identify the contractors that appear to offer the best value (considering the scope of services offered, hourly rates, and other factors, such as contractors' locations, as appropriate).
2. The request for quotes should be provided to at least three (3) contractors if the proposed order is estimated to exceed the micro-purchase threshold, but not exceed the maximum order threshold. For proposed orders exceeding the maximum order threshold, the request for quotes should be provided to additional contractors that offer services that will meet the agency's needs. Ordering offices should strive to minimize the contractors' costs associated with responding to requests for quotes for specific orders. Requests should be tailored to the minimum level necessary for adequate evaluation and selection for order placement. Oral presentations should be considered, whenever practical.

3.1.3. Evaluate Quotes and Select the Contractor to Receive the Order

After responses have been evaluated against the factors identified in the request for quotes, the order should be placed with the schedule contractor that represents the best value and results in the lowest overall cost alternative (considering price, special qualifications, administrative costs, etc.) to meet the Government's needs.

3.2. Blanket Purchase Agreements

The establishment of Federal Supply Schedule Blanket Purchase Agreements (BPAs) for recurring services is permitted when the procedures outlined herein are followed. All BPAs for services must define the services that may be ordered under the BPA, along with delivery or performance time frames, billing procedures, etc. The potential volume of orders under BPAs, regardless of the size of individual orders, may offer the ordering office the opportunity to secure volume discounts. When establishing BPAs ordering offices shall inform contractors in the request for quotes (based on the agency's requirement) if a single BPA or multiple BPAs will be established, and indicate the basis that will be used for selecting the contractors to be awarded the BPAs.

- **Single BPA:** *Generally, a single BPA should be established when the ordering office can define the tasks to be ordered under the BPA and establish a firm-fixed price or ceiling price*

for individual tasks or services to be ordered. When this occurs, authorized users may place the order directly under the established BPA when the need for service arises. The Schedule contractor that represents the best value and results in the lowest overall cost alternative to meet the agency's needs should be awarded the BPA.

- ***Multiple BPAs:*** When the ordering office determines multiple BPAs are needed to meet its requirements, the ordering office should determine which contractors can meet any technical qualifications before establishing the BPAs. When multiple BPAs are established, the authorized users must follow the procedures in Section 2.5.2, Paragraph 2, above, and then place the order with the Schedule contractor that represents the best value and results in the lowest overall cost alternative to meet the agency's needs.
- ***Review BPAs periodically:*** Such reviews shall be conducted at least annually. The purpose of the review is to determine whether the BPA still represents the best value (considering price, special qualifications, etc.) and results in the lowest overall cost alternative to meet the agency's needs.